



Better Email: How to Optimize Your Outreach

Email Marketing and Communications Program Evaluation and Optimization Worksheet

The Email Basics (A Friendly Gut-Check Moment)

1. Are you CAN-SPAM compliant? **Yes** or **No**
2. Are you GDPR compliant? **Yes** or **No**
3. Are you building your list organically? **Yes** or **No**
4. Are you sending a welcome email/campaign to new subscribers? **Yes** or **No**
5. Are you sending the welcome email within 24 hours of sign up? **Yes** or **No**
6. In addition to a welcome email, are you sending any form of triggered emails based on your customers/members actions? **Yes** or **No**
7. Are you doing any form of personalization? **Yes** or **No**
8. Are you segmenting any of your communications? **Yes** or **No**
9. Are you running A/B tests? **Yes** or **No**
10. Are you engaging in any form of list cleansing? **Yes** or **No**
11. Are you using alt-text? **Yes** or **No**
12. Are your emails mobile-friendly? **Yes** or **No**
13. When someone unsubscribes, are you polling them for the reason? **Yes** or **No**
14. Are you performing rendering tests on email sends before they go out? **Yes** or **No**

Key:

- = You're doing it correctly!
- = A re-evaluation is in order.

Performance Metrics Evaluation

This chart should be filled out for each distinct email type of campaign.

| | TODAY | LAST YEAR | INDUSTRY STANDARD* | GOAL |
|---|-------|-----------|--------------------|------|
| Subscriber List Size | | | N/A | |
| Open Rate (per list or email type) | | | | |
| Clickthrough Rate (per list or email type) | | | | |
| Conversion Rate (per list or email type) | | | | |
| Unsubscribe Rate (per list or email type) | | | | |

*Email performance benchmarks vary by email marketing software, industry, and business classification. Most major email marketing software companies publish an annual benchmarks report, which is a great place to start!

Recent Email Audit

1. Is the goal of the email clear, and is there an apparent hierarchy? **Yes** or **No**
2. Are your calls-to-action visually highlighted? **Yes** or **No**
3. Does the email enhance/comply with your brand personality? **Yes** or **No**
4. Does the email convey quality through excellent content and compelling design? **Yes** or **No**
5. If you turn off the images in your email, is the message of the email clear? **Yes** or **No**
6. Do you know what link generated the most clicks, and was it the one you intended?

7. Was there a desired conversion attached to the email? How did it fare?

8. Based on your learnings today, what could be improved?

9. Based on your learnings today, what could be tested for optimization purposes?

State of Your Database

1. What record attributes are present in your database that would allow personalization?

2. What percentage of your database has not opened an email in 3+ months? 6+ months?

3. What information about your records is unknown, but desired? How can you obtain that data?

Customer/Member Lifecycle Evaluation

1. Consider their lifecycle (starting with Acquisition, then Conversion, Retention, and Loyalty)—where can email be leveraged to support their path, in ways that are not being done today?

Helpful Next Steps

- Complete this worksheet, pass it along to others on your marketing team, and discuss results and recommendations for adjustments to your current email program.
- Sign up for 2-3 email marketing newsletters—ensuring regular exposure to thought leadership. (Newsletters from top email/digital automation platforms like Campaign Monitor, Salesforce Marketing Cloud, Hubspot, ReturnPath, Litmus, etc, and others like ReallyGoodEmails.com, and AWeber).
- Consider how you plan out your email content; email calendars mapped out beforehand are usually more thoughtful and creative.
- Evaluate your email marketing software with consideration of features/functionality you should be taking advantage of or essential components that are lacking.
- Set 1-2 goals that you can take action on, related to improving your email program, yet in 2018.
- Evaluate whether your current email marketing budget and tools will allow you to drive serious improvements in 2019; and if not—prepare a revised budget proposal.

If you feel overwhelmed, reach out to your Willow team to assist in improving your email program; we're here to help.



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